category, authorization, and matter for the one or more documents; and

instructions for allowing the second user to view, add, or modify any one of the documents in the repository according to the authorization of the second user with respect to a particular matter.

16. The software program of claim 15 further wherein the second graphical interface includes instructions for allowing the second user to view, add, or modify any one of the documents in the repository by:

A1

using a first filter for filtering items for the client and the matter; and

using a second filter for filtering items for which the second user has authorization.

17. The software program of claim 15 wherein the list of potential email recipients is selected according to the client, the category and the matter.

18. The software program of claim 15 wherein the service provider is a law firm.

REMARKS

Claims 1 - 14 were pending. Reconsideration and allowance of the pending claims is respectfully requested in light of the foregoing amendments and following remarks.

The pending claims stand rejected under 35 U.S.C. §103 for being obvious over a combination of between four and nine different prior art references. This rejection is respectfully traversed because the Examiner has failed to meet his prima facie burden of showing obviousness, and even when combined, the references do not teach the claimed subject matter.

1. The Examiner Has Failed To Meet His Prima Facie Burden Of Showing Obviousness

Several courts have admonished parties that used the claims of a patent "as a roadmap for finding prior art, and [then attempt] to combine that prior art with the hindsight afforded by it knowledge of [the claimed] invention." Not only is such a combination improper, it is actually evidence that the claimed invention is not obvious. See, e.g., *Ethyl Molded Products Company V. Betts Packaging, Inc.*, 9 U.S.P.Q.2D (BNA) 1001 (E.D. Ky 1988)("In support of its invalidity arguments, Betts has cited a multitude of alleged prior art references . . . and asked the court to combine these various teachings with perfect hindsight and the roadmap of the patents in suit. This is

improper, and the need for an infringer to cite large numbers of prior art references to prove a patent invalid indicates that the invention was in fact novel and not obvious." Citing *State Industries, Inc. v. A.O. Smith Corp.*, 221 U.S.P.Q. 958, 973 (M.D. Tenn. 1983); *Rohm and Haas Co. v. Dawson Chemical Co., Inc.*, 557 F.Supp. 739, 809 (S.D. Tex. 1983); and *Minneapolis-Honeywell Regulator Co. v. Midwestern Instruments, Inc.*, 298 F.2d 36, 38 (7th Cir. 1962).).

The fact that the Examiner has used up to nine different prior art references to piece together an argument of obviousness for a single claim not only indicates that the examiner has failed to meet his prima facie burden of showing obviousness, it also suggests that the invention is <u>in fact</u> novel and not obvious.

2. Even When Combined, The References Do Not Teach The Claimed Subject Matter

The Examiner has focused the rejection primarily on U.S. Patent No. 6,151,624 to Tear et al. (Teare). Teare provides a "Real Name System registration site", that expands on the functionality of the basic Domain Name System (DNS). (col. 1, lines 28-40; Table 2 at col. 12, lines 16-34). The Real Name System (RNS) provides "naming and locating network resources in a language-independent way." (col. 5, lines 66-67). In this system, clients are individuals on the web who are searching for a particular website. (col. 10, lines 30-37). Instead of using conventional metatags and other search engine techniques (col. 3, lines 13-23, 55-67), Teare provides a Registry 10 including a database 12 for storing a "'real' name associated with the information" located in a particular website. (col. 4, lines 4-6; col. 9, lines 5-20). Websites, referred to as "customers" (col. 11, lines 52-53), can enter their "real" information into the Registry by filling out a computerized "profile", such as is shown in Table 1 (col. 11, lines 19-33, 61-65).

Teare does not attempt to solve the same problem as the present invention, and even uses certain terms in a different context. For example, when referencing the claim term "...selecting a client...", the Examiner directs his attention to Teare's discussion of customers at col. 11, lines 66-67 and col. 12, line 1. (Office Action at pg. 3). However, a customer in Teare is a website who is seeking to have searchable metadata stored in the Registry. This is different from the term "client" as used in claim 1, which is a participant in a "collaborative management application." (Although not limiting to the present claims, the example of a "client" in the present patent application is a person or business who employs the services of a lawfirm.)

Since there is no teaching in the cited references of a client-participating collaborative management application, claims 1-14 are patentable over the prior art.

Claims 15-18 have been added to further define the present invention, and have not been added to overcome any of the current rejections. Furthermore, applicant submits that newly added claims 15-18 do not add any new matter.

3. Tear is not prior art.

Even if the rejection is sustained, Applicant respectfully submits that U.S. Patent No. 6,151,624 to Tear et al. is not prior art because the Applicant invented the claimed invention before the filing date (Feb. 3, 1998) of this reference. Evidence of Applicant's prior invention is provided in a separate affidavit, attached.

Should the Examiner deem that any further amendment is desirable to place this application in condition for allowance, the Examiner is invited to telephone the undersigned at the below listed telephone number.

Respectfully submitted,

D. O'Dell

David M. O'Dell
Registration No. 42,044

Date: April 8, 2002
HAYNES AND BOONE, L.L.P.
901 Main Street, Suite 3100
Dallas, Texas 75202-3789
Telephone: 214/651-5262
Facsimile: 214/651-5940
File: 8000.53.02

d-985398_1.DOC

I hereby certify that this correspondence is being deposited with the United States Postal Service as first class mail in an envelope addressed to: Commissioner of Patents, Box Non-Fee Amendment, Washington, D.C. 20231
on April 12, 2002

Mona Seidl

Mona Seidl

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

In re application of:	§	
Inventor Name: Steven R. Jenkins	§	
Serial No.: 09/419,327	§	Group Art Unit: 2177
Filed: October 15, 1999	§	Examiner: Dodds, Harold E.
	§	
Title: WEB-ENABLED TRANSACTION AND MATTER MANAGEMENT SYSTEM	§	

OIPE JCS8 APR 22 2002 PATENT & TRADEMARK OFFICE

AFFIDAVIT UNDER 37 C.F.R. § 1.131

Commissioner of Patents and Trademarks
Washington, D.C. 20231

Dear Sir:

I, Steven R. Jenkins, being duly sworn, depose and say:

1. I am the applicant of the above-identified patent application and am the inventor of the subject matter therein described and claimed.

2. All acts described in this affidavit took place in the United States of America.

4. Prior to February 3, 1998, I first thought of the invention claimed in the above-identified patent application. Prior to February 3, 1998, I disclosed this invention to my coworkers, using the notes provided in Exhibit A.

6. On or about October 2, 1998, I and my patent attorneys began preparation of the above-identified patent application for the invention claimed.

7. On October 16, 1998, provisional patent application 60/104,527, on which the above-identified patent application claims priority, was filed with the U.S. Patent Office.

8. At no time between February 3, 1998 and October 16, 1998 were my activities regarding disclosure of my invention in the above-identified provisional patent application ever suspended. It was my constant and continuous intention to diligently move towards disclosure of my invention by filing the above-identified provisional patent application.

9. Based on the foregoing facts, I believe that I conceived my invention prior to February 3, 1998 and that I was diligent in preparing the provisional patent application for filing on October 16, 1998.

10. Furthermore, I declare that all statements made herein of my own knowledge are true and that all statements made on information and belief are believed to be true; and further that these statements were made with the knowledge that willful false statements and the like so made are punishable by fine or imprisonment, or both, under Section 1001 of Title 18 of the United States Code, and that such willful false statements may jeopardize the validity of the application or document or any patent issuing therefrom.

FURTHER Applicant says not.

Steven R. Jenkins

Steven R. Jenkins

The above signature was executed before me, a notary/magistrate/foreign official (circle one) duly authorized to administer oaths, before me this 12th day of April, 2002.

JEFFRE LITTLETON
Name of notary, magistrate, or foreign official

Jeffre Littleton
Signature

Location: DALLAS, TEXAS

My Commission expires: 1/14/06.

D-1008597.1

JEFFRE LITTLETON
MY COMMISSION EXPIRES
January 14, 2006

ns

HIGHLIGHTING KEYS

set; non-variable

variable; determined by choices in New Client Wizard

variable; determined by choices in New Project Wizard

Data Input

Reports only; data previously input

Column Key

CLIENT CONNECT
Specific Keys

- **Storefront**
  - Links to specific areas *direct paths*
  - Return to Storefront
  - Division / All Projects / Project Approach
  - Navigation Tools

- **Transaction Management**
  - Status
    - Method for Most Current? *Multiple Party Input* *last edit time & date stamp by person?*
  - Issues
    - Template List of Categories of Issues / Client
    - "Hot" Issues *Key*
    - Responsibilities
    - Discuss
    - Collapsible for Concurrent Text
  - Critical Dates
    - Template List of Critical Dates / Client
  - Checklists
    - Specific Checklists / Templates for Client
  - Action
    - Report Accessible by Each Person
  - Working Group
    - Input Form
    - Auto Assign to "WG #s"

- **WG #s**
  - Horizontal -- 1 line -- Format

- **E-mail**
  - Easy Access
  - Auto setup -- From
Re -- Client Connect [category]
Date
  - To; CC; BC -- Pop-up Address Lists
Internal Distribution
Distribution Lists *set up default distribution per screen*
  - "Copy" Issue ?

- **Transaction Management Reports**
  - Each "Standard" Report Customizable on Spot *pop-up variable*
  - Data Input in Reports ✓
  - Context Must Show ✓
  - All Projects or Selected (1 or more) Projects ✓

• Status Report	- Method for Most Current ✓ multip. people time/date stamp
• "Hot" Issues Report	- Customizable for All or Outstanding Only
• Issues Report	- Customizable for All or Outstanding Only
• Critical Dates Report	- Customizable for Period
• Checklist Report	- Customizable for All or Outstanding Only
• ~~Active~~ action Report	- Customizable for All or Outstanding Only - Customizable for Each ~~Active~~ action Party
• Responsibility Report	- Customizable for All or Outstanding Only - Customizable for Responsible Party
• Discussion Report	- Customizable for All or Outstanding Only - Customizable for Discussion Party
• Custom Thelen review & give ideas	- Multiple Options
• Projects Report	- Columns Per Report - All Reports automatically for that project
• Document Management	- From WP or Acrobat (scanned) - Description by Attorney / Client / Staff - Searchable by WP or Acrobat - Links to actual document or item
• Counsel Information	- From WP or Acrobat (scanned) - Description by Attorney / Client / Staff - Searchable by WP or Acrobat - Links to actual document or item
• Client Information	- From WP or Acrobat (scanned) - Description by Attorney / Client / Staff - Searchable by WP or Acrobat - Links to actual document or item
• Library	- From WP or Acrobat (scanned) - Description by Attorney / Client / Staff - Searchable by WP or Acrobat - Links to actual document or item

CLIENT CONNECT
General Keys

- 2-Way Input / Password Limited yes
- JM will check
  Input in Both Transaction Management and Transaction Management Reports
- Input and/or Reports for Attorneys on Multiple Clients "Files" button – yes
- Division / All Projects / Projects Approach JM will check – think OK
- Storefront / Return to Storefront yes
- Navigation Tools: Return to Storefront
  on all pages Working Group #s
  E-mail
  Files (for Attorneys Only)
  all OK
- Data Input: Method HTML – OK
- Wizards: New Client -- for setup of new client
  New Project -- for setup of new project
  Data Input -- for data input non issue – HTML direct input
  Password -- for password administration
  "intelligent"
- Context: e.g., "Project, City, State" throughout
  Issues Category
  Specific Transaction Management--e.g., Critical Dates/Action/etc.
- Reports: Variations of ~~Customizable in~~ Each "Standard" Report
- Archive: When Complete Project
- Data or File Limits no issues
*• Data Input: In Views for Easy Access HTML – OK
- Password: Limitations / Keys later, major discussion

COLLABRANET

General Keys

- Input and/or Reports on Multiple Clients

JM - default to division or last one?

Client Connect – Client Storefront

To permit multi-division access
eg Arden Dispositions
Acquisitions
Litigation

Client Connect – Client

Division [ ] All Projects ○ Project [ ]

Transaction Management
- Status
- Issues
- Critical Dates
- Checklists
- Action
- Working Group

Document Management

Counsel Information

Client Information

Library

TM Reports
- Status Report
- ~~Hot~~ Issues Report
- Issues Report
- Critical Dates Report
- Checklist Report
- Action Report
- Responsibility Report
- Discussion Report
- Project Reports
- Custom Reports

Data Input

☐ Storefront ☐ Working Group #4 ☐ E-Mail Files ☐

Note:
Navigation tools could be at side

Storefront Button

File Button
- to access other files eg Archive
  PRT
  TW
  HB
  SEG
- opens storefront page for applicable
- Counsel Query

INTEGRATION of DATABASES

CollabraNet Storefront

CollabraNet - Haynes and Boone, L.L.P.   Steven R. Jenkins

☐ Storefront   ☐ E-mail

By Attorney   All Action Items by Client | Project   + Action Button

. Better if goes to calendar tickler

Firm Intranet / Links to Client Content

PRACTICE MANAGEMENT
- Calendar
- Phonebook
- [illegible]
- Time Entry
- C/M List
- Docs Open
- To Dos

Firm
- HB Apps
- Announcements — Firm
- Clients
- BOD

Library — (CDR)

Docket Calendar

TRANSACTION/MATTER Mgt
- C/M Info
- TM Standalone
- Closing Contact

Communications

Keys relate to individual calendar

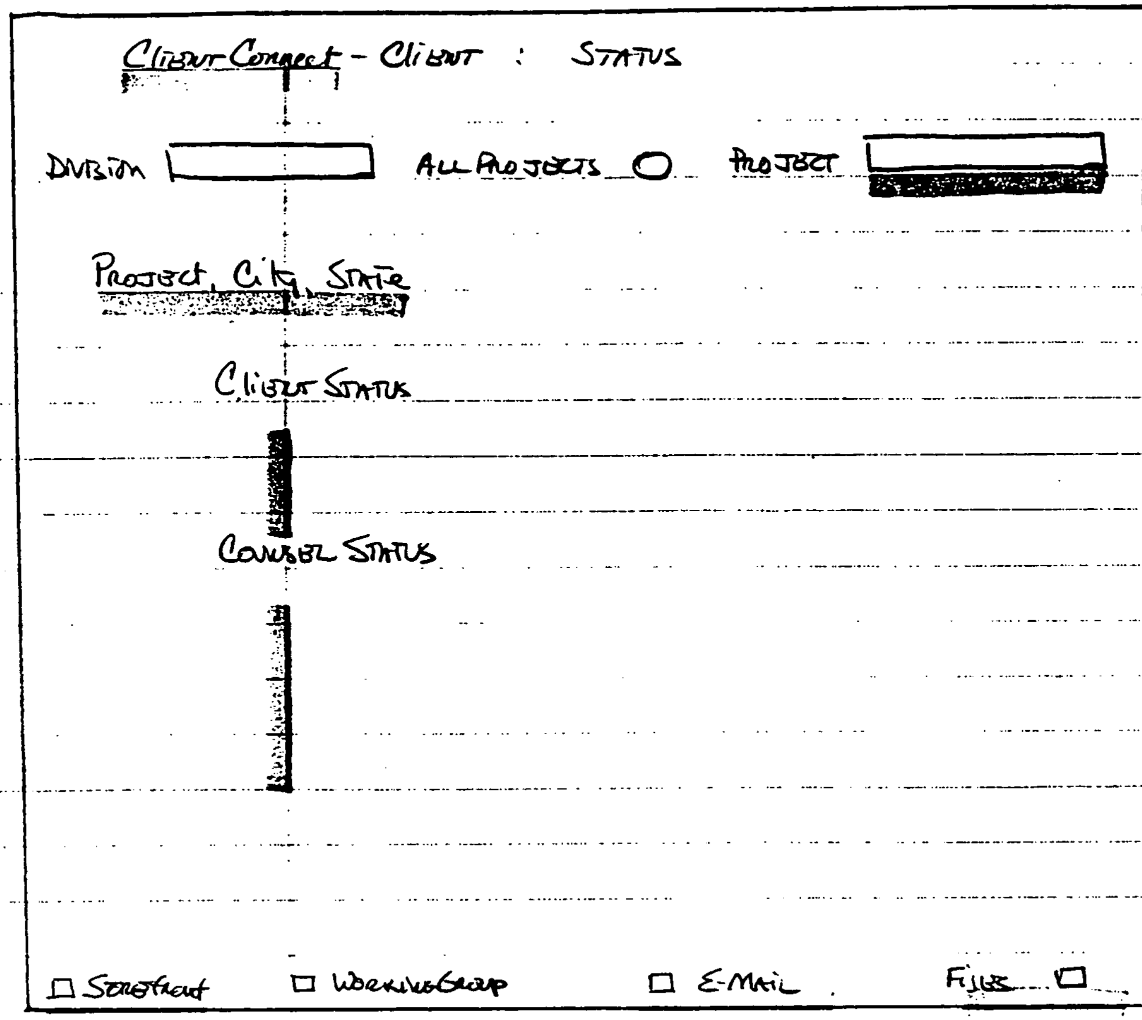
Client Mgt
- C/M info
- New client/matter info
- AR/Billing — Elite
- Conflicts

Dept

Doc Library
Records

Client Dev
- Current
- Dept
- Firm
- Presentations
- BD Directions

Communications
- E Mail
- Remote Access
- Client Content



RP- math
determine

Also - "L
Edit Da

ALL PROJECTS

for Filter

Status

~ for auto assign rules

	Done
Status	
Project → 52 & 56 Roland St., Charlestown, MA	
A. Weekly Status Report~	
WeeklyReport → 1. **Week of 1/5/98:** Inspection Period extended until 1/15/98; Closing scheduled for 2/6/98; Buyer still assessing certain environmental matters.	

Purpose: to view weekly status report by Project; uses filter to "hide" prior reports; for clients' convenience, uses filter to limit view to only most current

Expand to include client A

Printed 11:53p 2/12/98

Client Connect - Client : Issues

Categories = ALL or Specified variables

Division [ ] All Projects ◯ Project [ ]

Category [ ] Hot Resp. Discuss Attachments Daily

Sales - Cu List of Issues Categori

Project, City, State

[Sales Agreement Issues]

1. [Issue]
2. [Issue]

☐ Storefront ☐ WorkingGroup ☐ E-Mail Files ☐

ALL PROJECTS

for filter

Issues

~ for autoassign rule

Bold = template

	Resp.	Discuss	Attempted	Done	Date
Issues					
jECT → ◘ 52 & 56 Roland St., Charlestown, MA					
A. ◘ Issues Checklist					
1. ◘ **Input/ Initial Drafting Issues (List):**					
2. ◘ **Local Counsel Issues (List):**					
3. ◘ **Sale Agreement Issues (List):**					
a. ◘ **Section 3.2(a) & 3.9(a) – Brady wants rep from Seller that Seller hasn't received written notices from the govt. as to non-compliance with applicable laws, regulations, etc.**					
b. ◘ **Section 3.3(b) – Brady wants Purchaser's liability limited to "negligence in conducting inspections or tests" rather that simply any claims "arising out of Purchaser's inspections or tests"**					
c. ◘ **Section 3.6(a) – Brady wants to state that Purchaser will give Seller copies of reports, tests, etc. only if Purchaser does not close. He also wants Seller to pay for 1/2 of the cost thereof if Purchaser does not close.**					
4. ◘ **Title/ Survey Issues (List):**					
5. ◘ **Inspection Period Issues (Purchaser Identified) (List):**					
6. ◘ **Closing Issues (List):**					

PURPOSE. to input and view outstanding issues by PROJECT / type of issues;
for clients' convience, uses filter to limit view to only outstanding issues

Columns in this view and other views serve specific purposes:

- Resp.: person responsible for issue (POP UP – to assign responsibility)
- Discuss: identity of person to discuss issue with (POP UP – to assign to individual)
  Note: assignments are shown in "Discussion View" sorted by Project
- Attempted: "attempted" to discuss (✓ column)
- Done: date stamp (for hide done filter)

Suggested IMPROVEMENT:

- create new view for "Hot Issues" to put limited number of genuinely key (ie. "deal buster" issues) in front of senior management

Template Project and ALL Projects

Hidden Column for "Master Calendar"

Critical Dates

	Resp.	Approved	Discuss	Date	Done Check	Critical Dates
Critical Dates~						
52 & 56 Roland St, Charlestown, MA						
A. Sale Agreement Summary~						
1. Critical Dates Summary and Checklist~						
a. Roland St. - Effective Date **(Section 10.3): ________, 19__ (date on which the Title Company executes the Joinder of Title Company following the execution by both Purchaser and Seller)**						
b. Roland St. - Deposit of Initial Earnest Money **(Section 2.2(a)): ________, 19__ (within one business day after the Title Company has received a copy of the Agreement executed by both Seller and Purchaser); note: Purchaser also to deposit with Seller $100 Independent Consideration**						
c. Roland St. - Deposit of Additional Earnest Money **(Section 2.2(a)): ________, 19__ (within one business day after the expiration of the Purchaser's Inspection Period)**						
d. Roland St. - Availability of Due Diigence Documents **(if date applicable, Section __): ________, 19__ (__ days after Effective Date)**						
e. Roland St. - Title Commitment/ Title Documents **(Section 5.1): ________, 19__ (__ days after Effective Date)**						
f. Roland St. - Survey **(Section 4.1): ________,19__ (__ days after the Effective Date); note: Agreement does not specify exact date for delivery**						

Client Connect – Client : Critical Dates

Division [ ] All Projects ○ Project [ ]

Resp. Approved Discuss Date Done

Project, City, State

JM – need popup for date selection

1 [Date, Item]

2 [Date, Item]

Template

RP –
for Comp
Calenda
must i
Project A
each i

☐ Storefront ☐ Working Group ☐ E-Mail Files ☐

Critical Dates

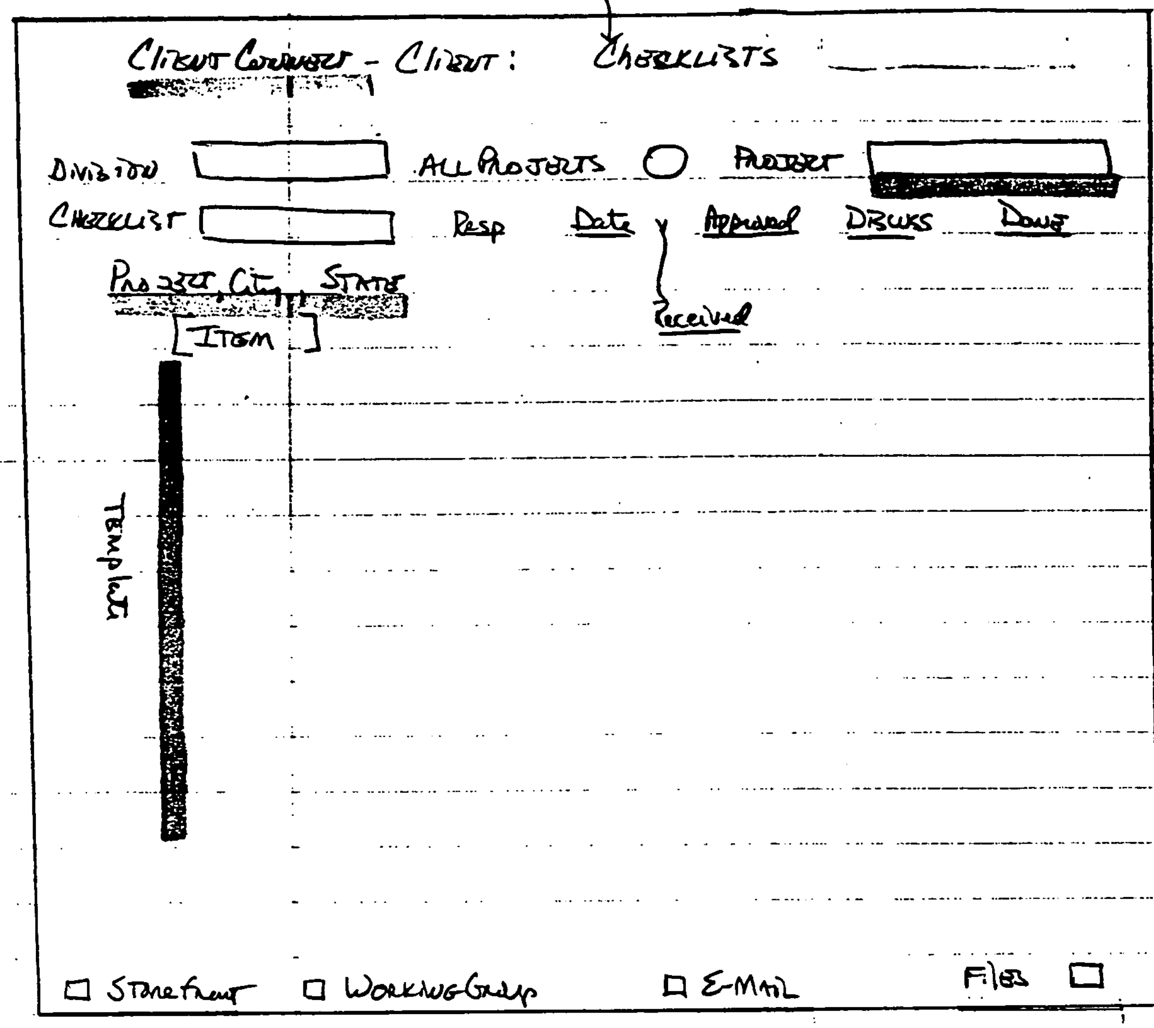
		Resp.	Approved	Discuss	Date	Done Check	Critical Dates
m.	❑ Roland St. - Special Dates:						
n.	❑ Last Edit Date: __/__/__(__)						

Purpose: to track Critical Dates by Project and date item

to create "Master" Calendar of Critical Dates for all Projects

NOTE: WIZARD VARIABLE
eg "Closing Checklist"
or "Due Diligence Checklist"

SRJ – Cr
alternate
checklist



Template

PROJECT

Checkmark or date without A

Due Diligence

	Resp.	Date	Approved	Discuss	Done	Check
Due Diligence						
xut → 52 & 56 Roland St , Charlestown, MA						
A. Due Diligence Checklist~						
1. **Seller's Deliveries:**						
a. **Title Information**						
1. **Survey**						
2. **Title Commitment**						
3. **Title Documents (Exceptions)**						
b. **Property Information**						
1. **Environmental Reports**						
2. **Assessments**						
3. **Ad Valorem and Personal Property Tax Bills**						
4. **Notices or Correspondence from Governmental Entities**						
5. **Rent Roll**						
6. **Monthly Operating Statements**						
7. **Certificate(s) of Occupancy**						
8. **Plans and Specifications**						
9. **Service Contracts**						
10. **Summary of Operating Expenditures**						
11. **Licenses**						
12. **Pending Litigation**						
13. **Leases (for non multi-family)**						
14. **Other Documents or Information**						
c. **Other Information**						

Purpose: 2-way checklist for closing

No filter - Always view entire checklist

Template Project

Checkmark or date (without

Closing

	Resp.	Date	Approved	Discuss	Done	Check
Closing						
→ PROJECT 52 & 56 Roland St., Charlestown, MA						
A. Closing Checklist~						
1. **Seller's Deliveries (Section 7.2 (a)):**						
a. **Deed**						
b. **Bill of Sale, Assignment and Assumption- Exhibit C**						
c. **Seller's FIRPTA Affidavit**						
d. **Owner's Title Policy**						
e. **Closing Statement**						
f. **Evidence of Authority**						
g. **Original Leases**						
h. **Assumed Contracts**						
i. **Other Documents Required by Sale Agreement or by the Title Company**						
j. Tenant Estoppel Certificates						
k. Other Documents Identified During Due Diligence Process or by Agreement of Parties						
2. **Purchaser's Deliveries (Section 7.2 (b)):**						
a. **Purchase Price, plus or minus prorations**						
b. **Bill of Sale, Assignment and Assumption- Exhibit C**						
c. **Closing Statement**						
d. **Evidence of Authority**						
e. **Other Documents Required by Sale Agreement, Seller or by the Title Company**						
f. **Other Documents Identified During Due Diligence Process or by Agreement of Parties**						

PURPOSE: 2-way checklist for closing

Nofilter - ALWAYS view entire checklist

Printed 11:54p 2/12/98

Date

Client Connect - Client   Action

Action Party =
All Client / Counsel
individuals

Division [ ]   All Projects ○   Project [ ]

Action Party [ ]   Resp   Discuss   Attempted   Done

Project, City, State

[Action Party
E.G. HB - Jenkins]

1. [Action Item]
2. [Action Item]

☐ Storefront   ☐ Workinggroup   ☐ E-Mail   Files ☐

RP -
cross 2
to CN

Resp / Discuss

WORKING ~~Group~~ Setup Info

Resp / Discuss

NAME	Company	Role	Resp. / Discuss	Mailing	Tel

SAJ - DeGuire F

Counsel : SNJ

RP - imp suggest

H+B

981 Main St. Suite 3100

Dallas Tx 75202

~~Justin@ haynboo~~

(o) 214-657-5203

(h)

(m)

(F)

(E)

WP System

WG #1

WG #2
Project

Name	Company	Role	Telephone	Fax	E-Mail
Jenkins Steven R	H+B	Counsel			

NOTE: if "Working Group" is selected in
NEW CLIENT WIZARD, then
"Working Group #'s" should be automatically generated
and "Working Group #" button should appear at
bottom of all screens

Client Company [redacted] Client : WORKING GROUP Numbers

DIVISION [ ] ALL ACCOUNTS: ○ PROJECT [redacted]

PROJECT, City, STATE
[redacted]

NAME	Company	Role	Work #	Fax #	E-MAIL
[redacted]					

☐ Storefront ☐ Working Group ☐ E-MAIL Files ☐

Address-
Names
Internal Group
Distribution Group

Auto: User

Auto: default
option: user-specified

ClientConnect - Client E-Mail

RP— de
capabili

To: cc: bc:

From: [User]

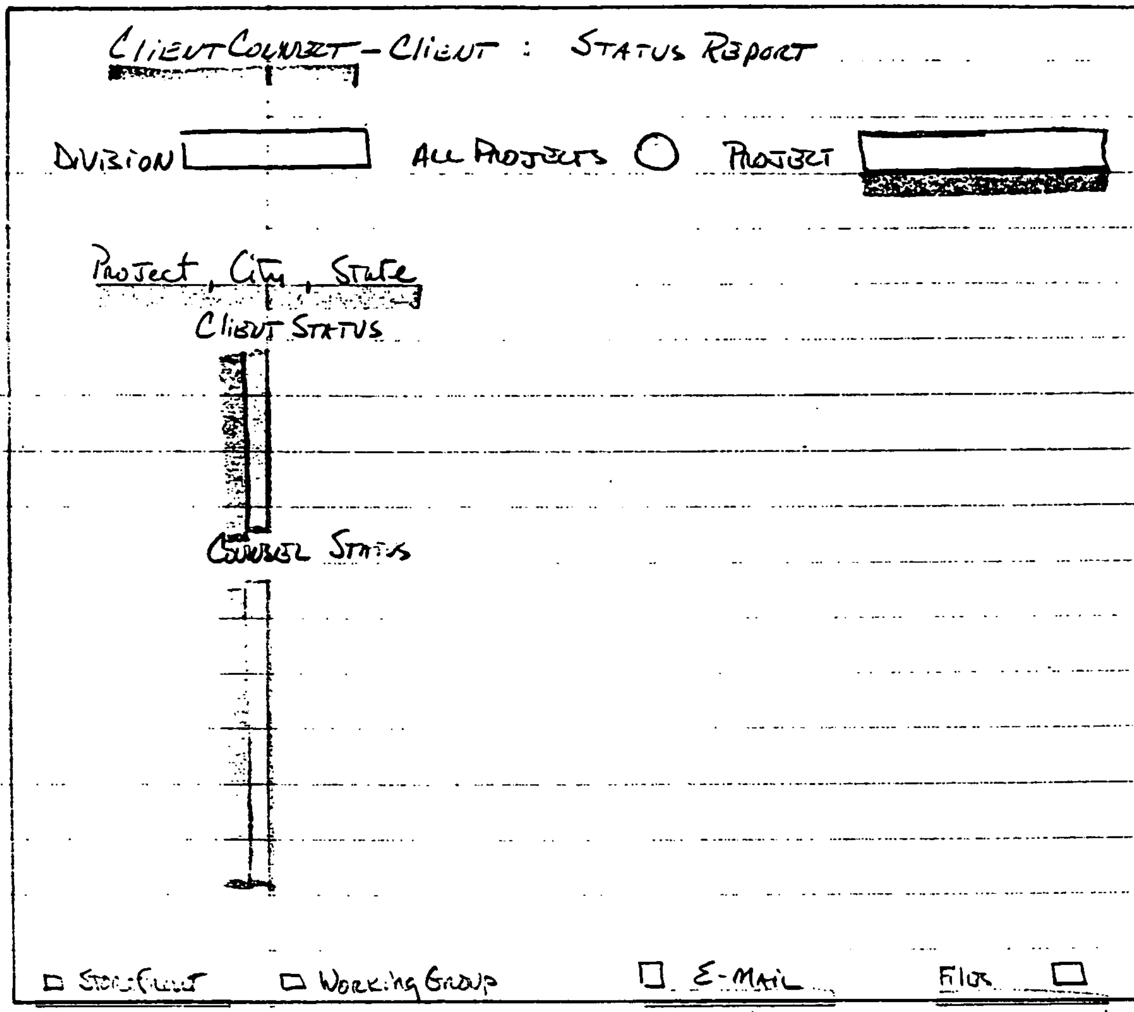
Date:

Re: ClientConnect: Transaction Management - Issues
Project, City, State

RP—Ab
to "ext.
E-Mai

Purpose :

Client/land developer



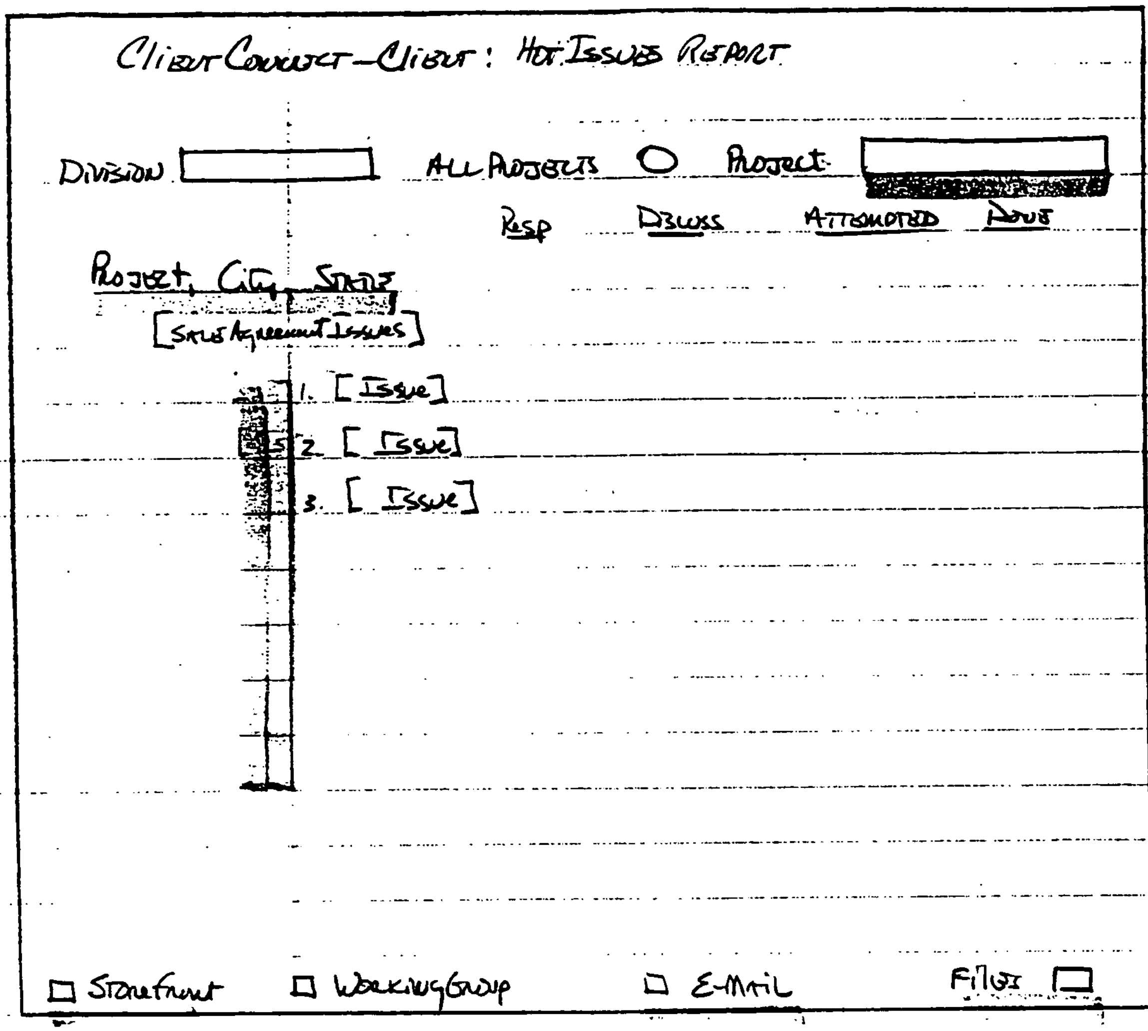
Discuss
determi
"Most Rec
and "La
Edit Da

Purpose : quick, thumbnail status report
from client and counsel
Show most recent - until changed

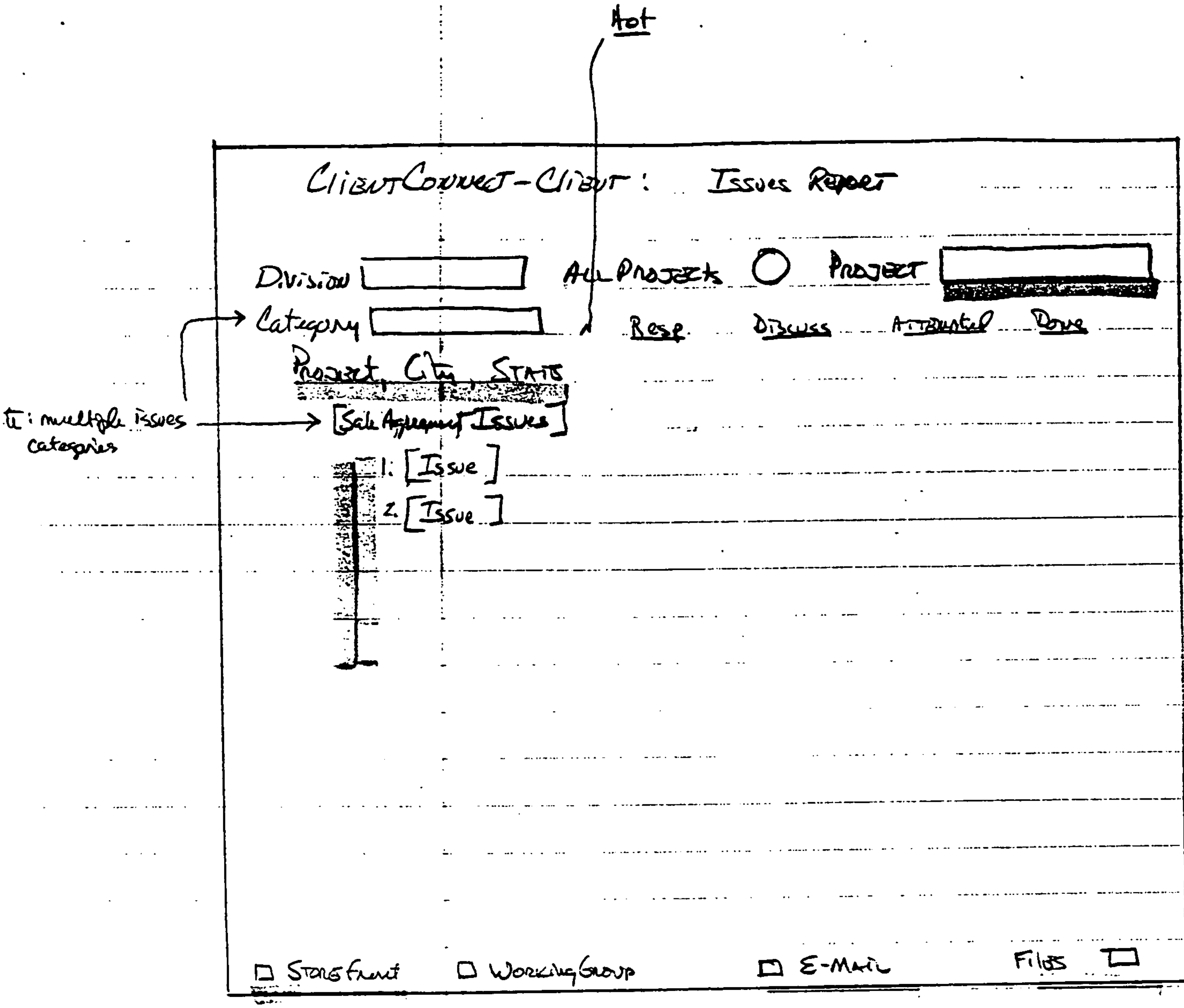
Input: Counsel/Staff - into TM Status

Links: None

Relationship

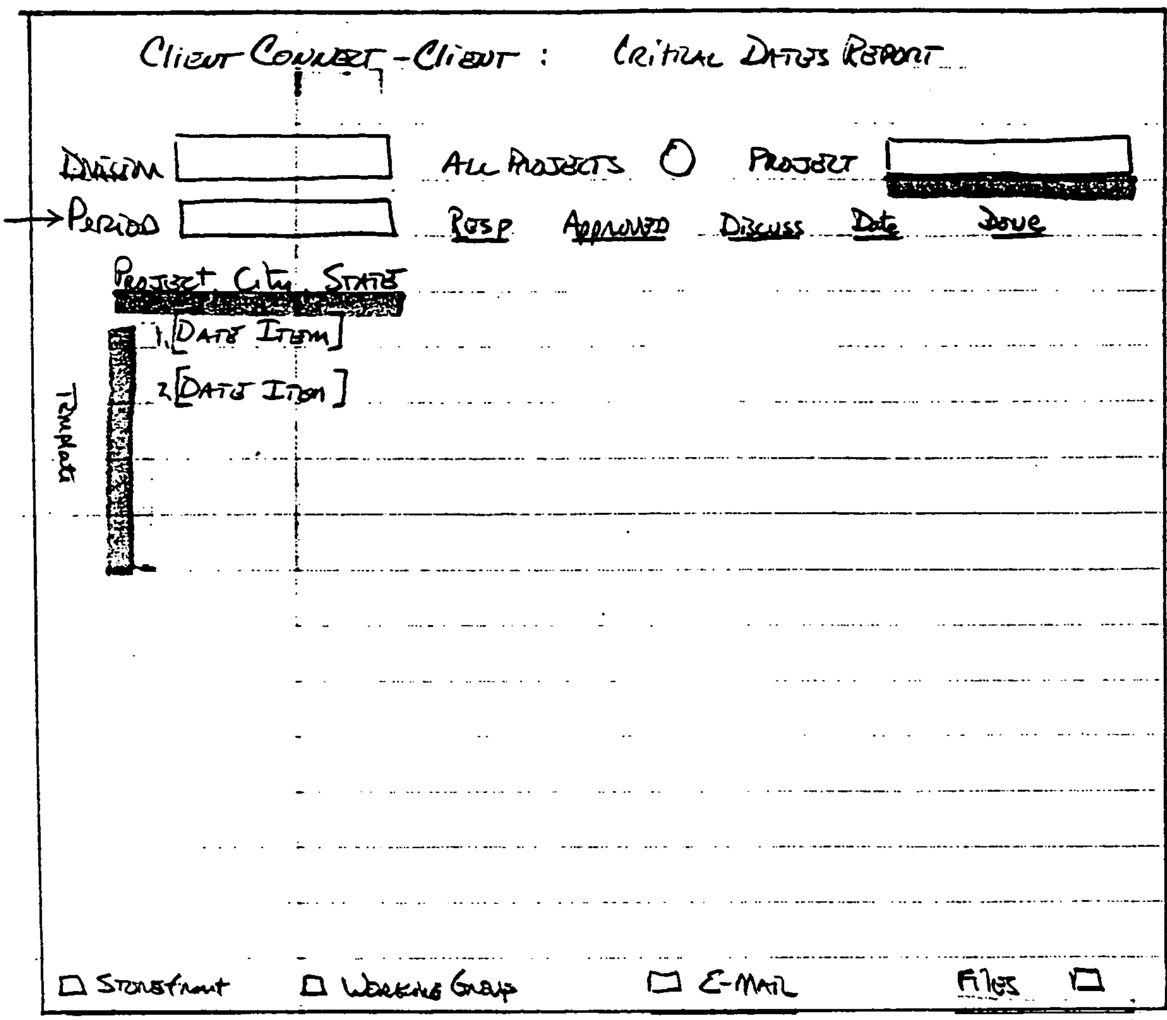


Purpose: show all outstanding "Hot" Issues
sorted by Project/Area (eg Issues, Critical Dates)



Purpose: show all outstanding "Issues"
sorted by Issue Category

efault to
ext 15 days
ll options 30
45
60
90



Status "
column f
input
View

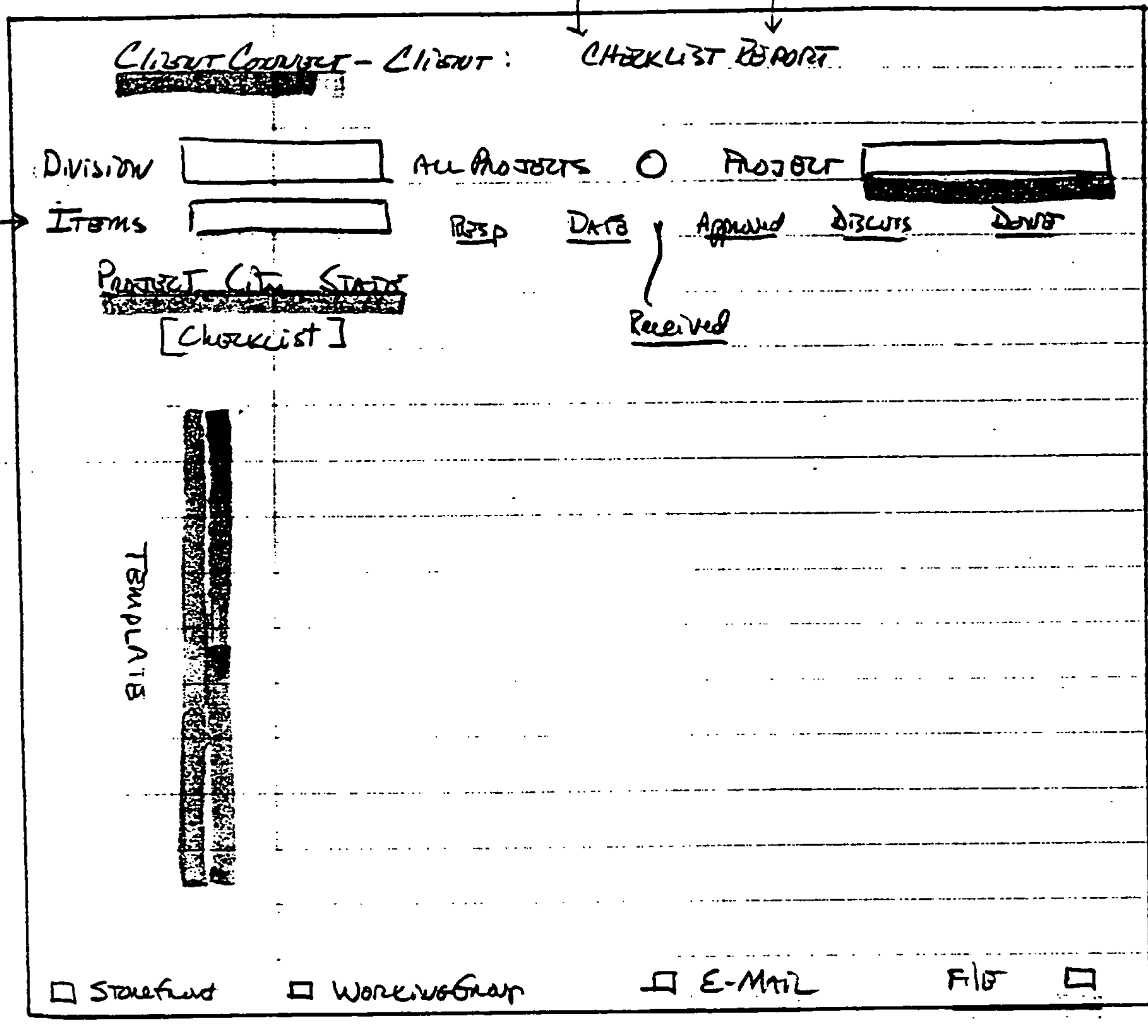
Purpose : show items per Critical Dates to be completed in next period — 15 days by default

NOTE: Wizard Variable
eg "Closing Checklist Report" or
"Due Diligence Checklist Report"

Note: Default is
OUTSTANDING
Custom for ALL

Separate
Report f[illegible]
each che[illegible]

Option =
ALL ITEMS
or Incomplete ITEMS



Purpose: to show OUTSTANDING checklist items by default

NOTE: Default to OUTSTANDING
Custom to ALL

ClientConnect - Client   Action Report

Division [ ]   All Projects ○   Project [ ]

Action Party [ ]   Resp. Date   Discuss   Attempted   Done

Project, City, State

[Action Party]

1. [Action Item]
2. [Action Item]

☐ Storefront   ☐ Working Group   ☐ E-Mail   File ☐

Purpose: to show outstanding Action Items by Action Party

Note: Default to Outstanding Responsibility Items

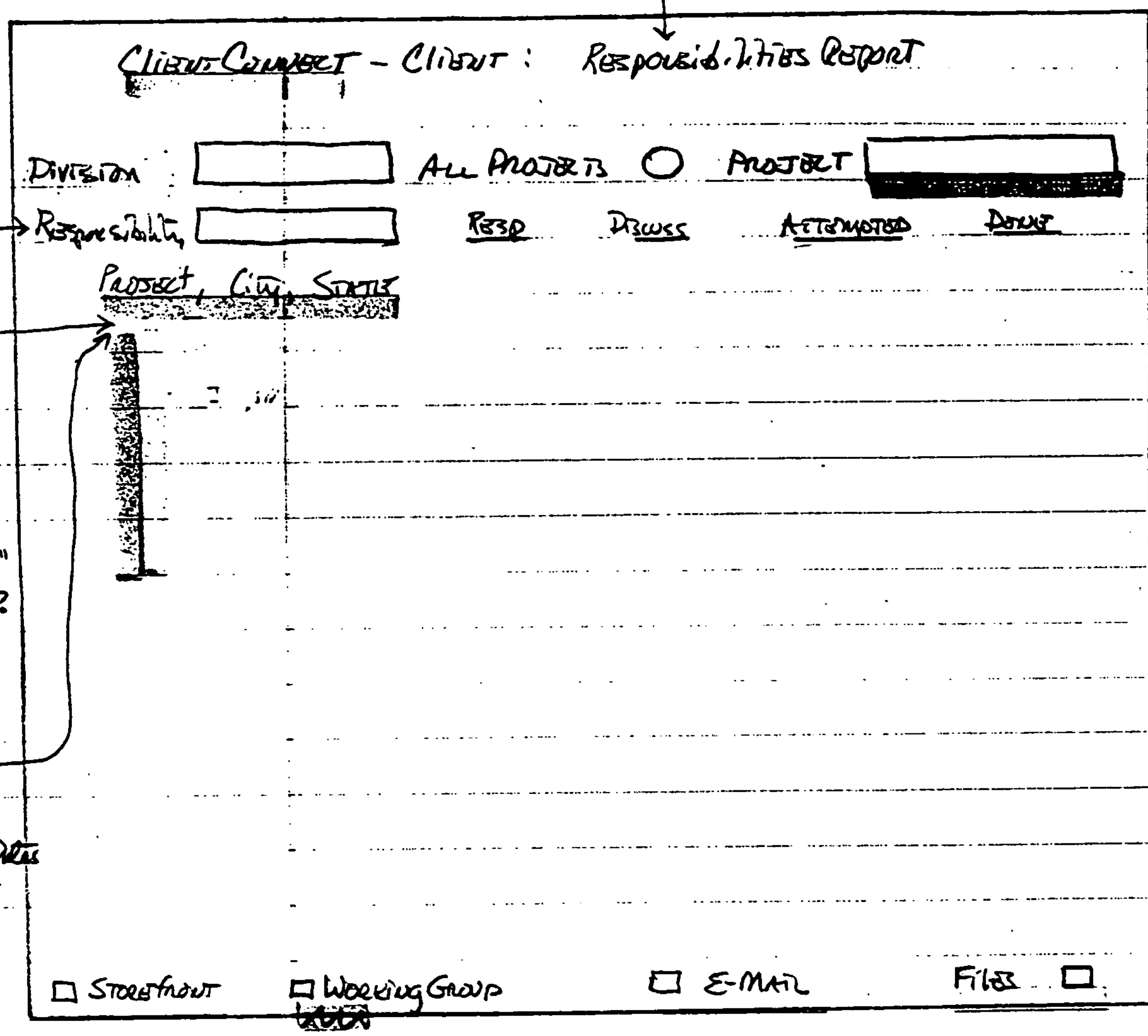
Custom for all items

Options: ALL or Individuals

If "ALL" — then show each "Name" as context, then list Responsibility Items

JM — can we set default to "user" based on password? or default to last specified?

Context - eg Issues Critical Dates Checklist



Purpose: to show outstanding responsibility items by responsibility party

Note: Default to OUTSTANDING DISCUSSION ITEMS

CUSTOM REPORT FOR ALL ITEMS

CLIENT CONNECT – CLIENT DISCUSSION REPORT

DIVISION [ ] ALL PROJECTS ○ PROJECT [ ]

Options: ALL INDIVIDUALS → DISCUSS WITH [ ] RESP DISCUSS ATTEMPTED DONE ← Note: l

"Done" c
for imp
in this

PROJECT, CITY, STATE

If "ALL" – then show each "name" then Discussion items

1. [ITEM]

2. [ITEM]

JM – Can we set default to "user" based on password?

Content – eg
Issues
Critical Dates
Checklist

☐ STOREFRONT ☐ WORKING GROUP ☐ E-MAIL FILES ☐

Purpose: to show OUTSTANDING DISCUSSION ITEMS by Discussion Party

Discussion Report SAmple

	Resp.	Attempted	Discuss	Done
☐ A-Huff				
☐ A-Harris				
☐ A-Johnson				
☐ A-Barger				
▫ 52 & 56 Roland St., Charlestown, MA				
A. ▫ Issues Checklist~				
1. ▫ Sale Agreement Issues (List):				
a. ▫ Section 3.2(a) & 3.9(a) – Brady wants rep from Seller that Seller hasn't received written notices from the govt. as to non-compliance with applicable laws, regulations, etc.	▫ A-Huff		▫ A-Barger	
☐ HB-Jenkins				
☐ HB-Lowry				
☐ HB-Raines				
☐ HB-Hudnall				
☐ HB-Melton				
☐ HB-Miller				
☐ HB-Wilkinson				
☐ Loc. Counsel				
☐ Purchaser				
☐ P's Counsel				
☐ Title Company				

Purpose: to view issues that relate to a specific person – viewed by Project Assigned by "Discuss" Column

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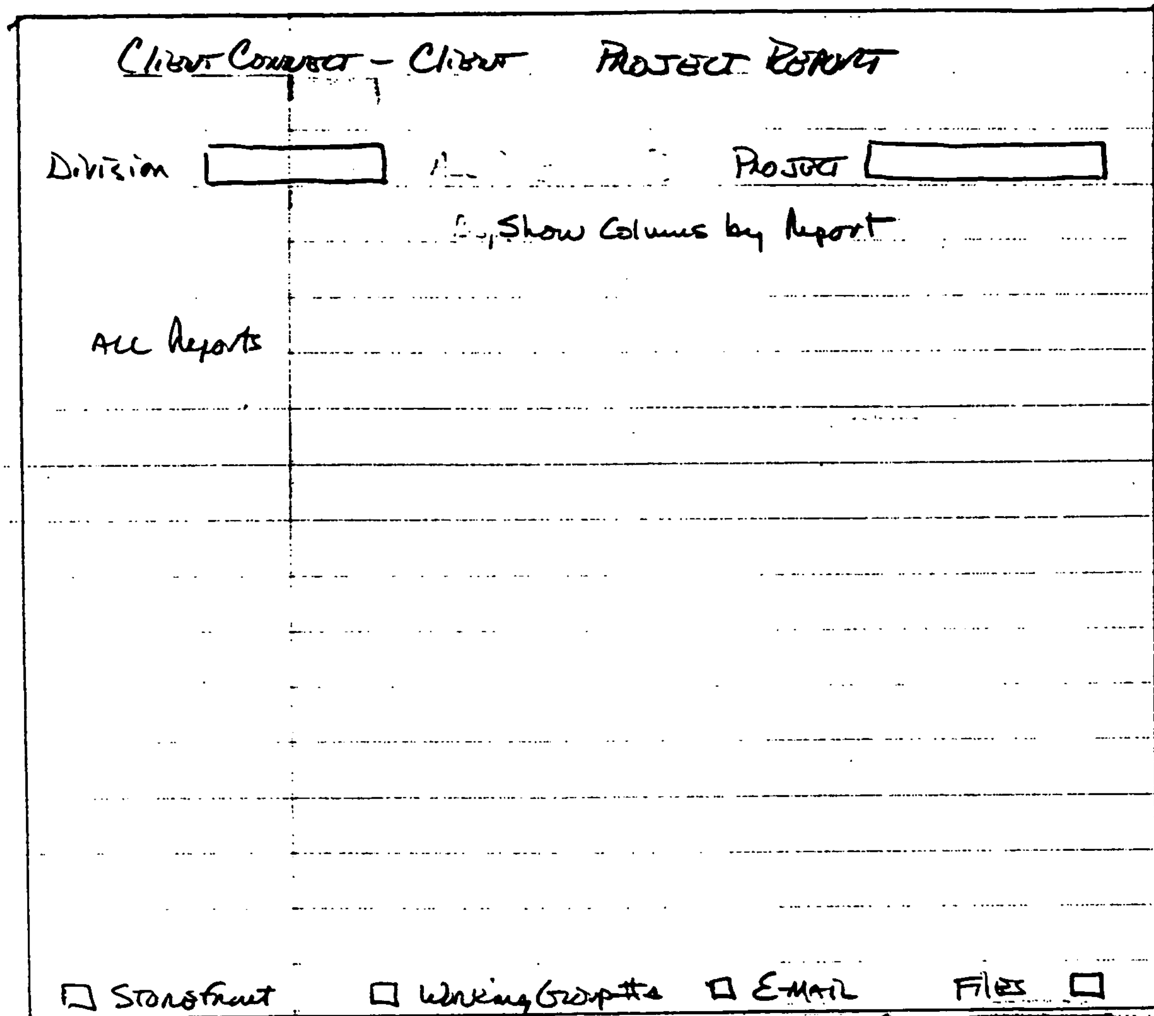
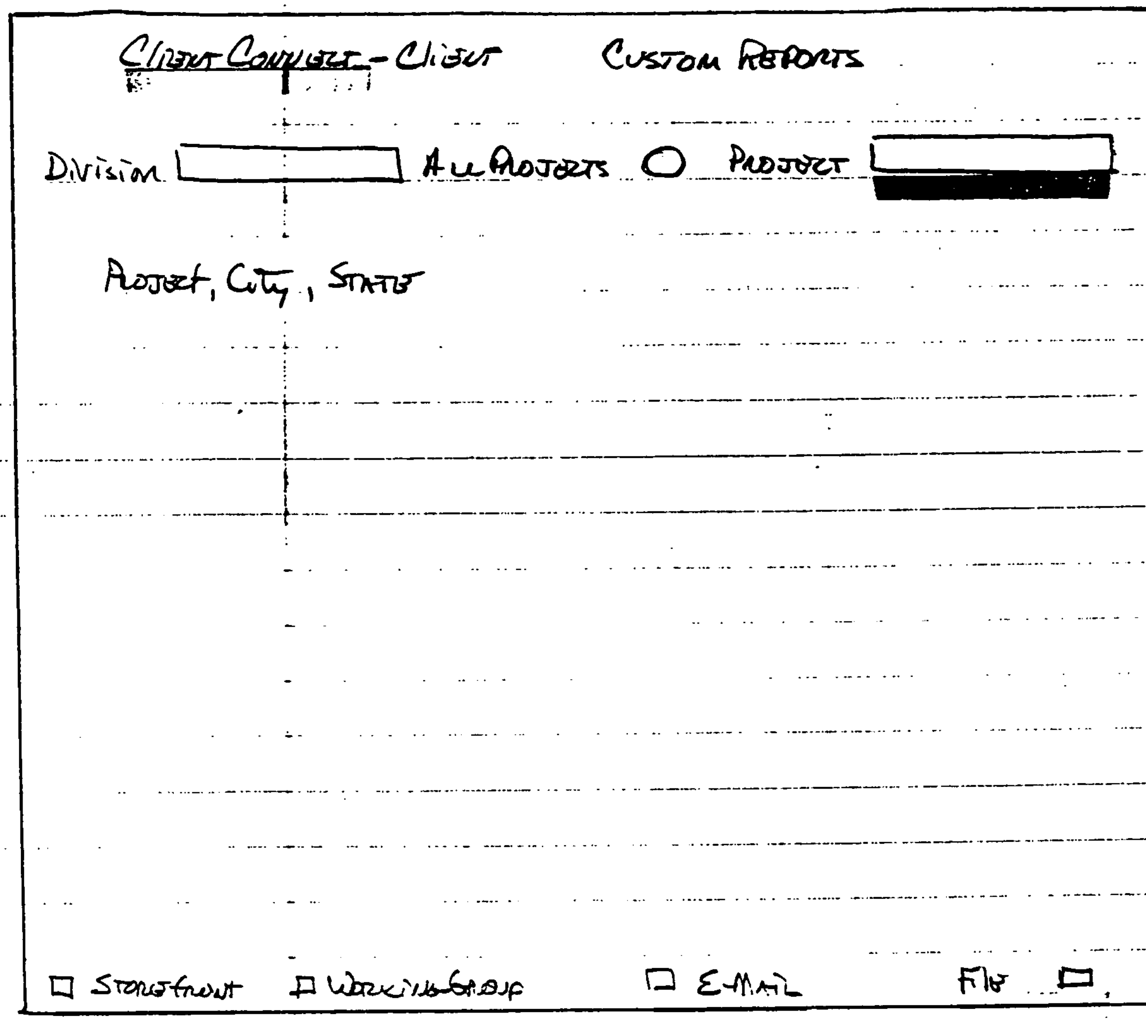

Client Connect - Client Project Report
Division
Project
Show Columns by Report
All Reports
Storefront
Working Groups
E-Mail
Files

Discuss Custom Reports



Client Connect – Client: Document Management

Division [ ] All Projects ○ Project [ ]

Project, City, State

Document A [e.g. Sale Agreement]
- Draft #1, dated _/_/_
- Draft #2, dated _/_/_
- Comments, dated _/_/_ [description: eg. Buyer's Comments]

Document B
- Draft #1, dated _/_/_
- Execution Form, dated _/_/_

Letters

Memos

☐ Storefront ☐ Working Group ☐ E-Mail Files ☐

Clicking links to Document

· Secretarial Input

Consider: to "Issu

Purpose: Counsel Generated documents
Share, especially Redlined versions
Client can view/print

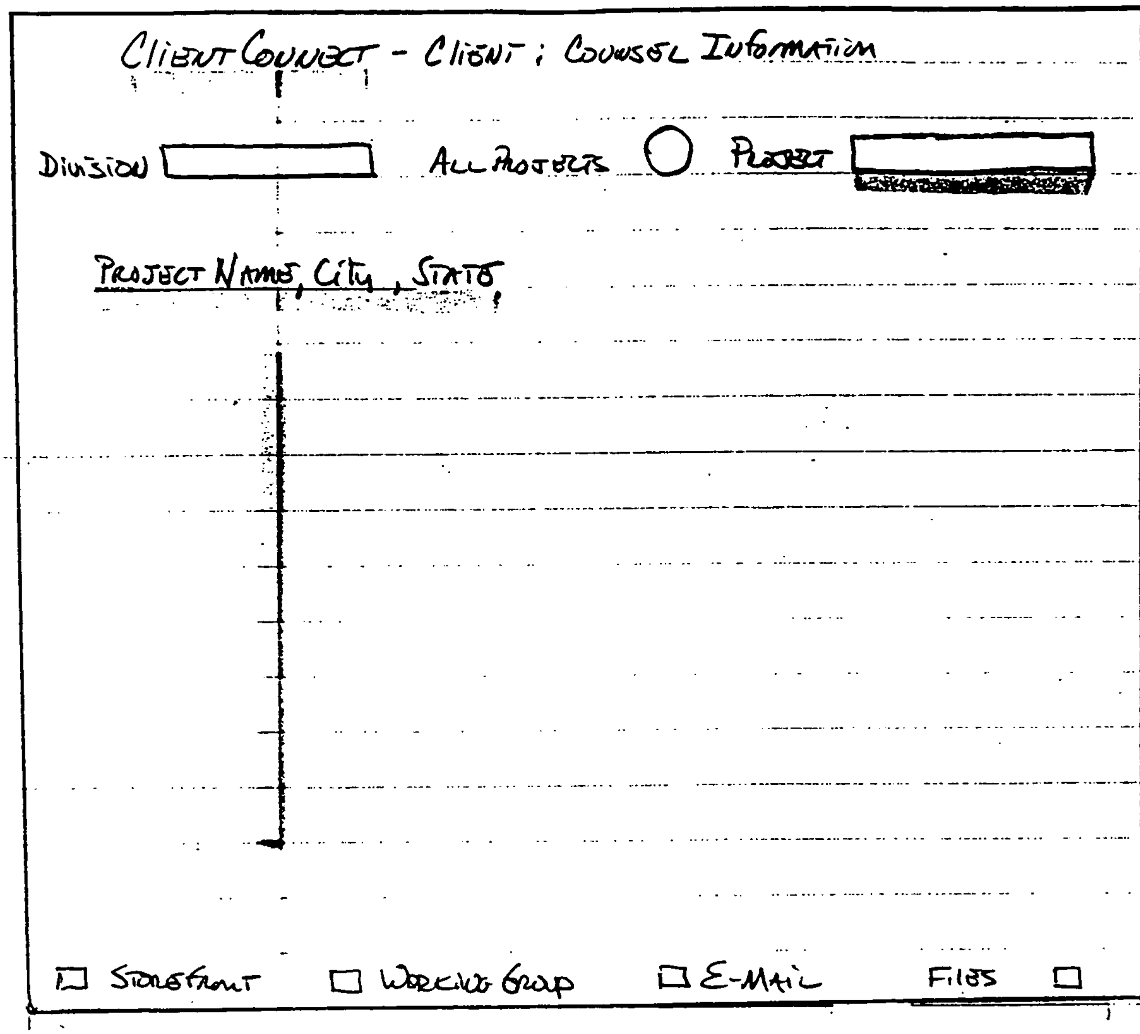
· Explore WP Highlighting tools

Consider Letters Memos

Input: Counsel/counsel staff

Links: to specific document

Relationships: Links only



Consider Issues

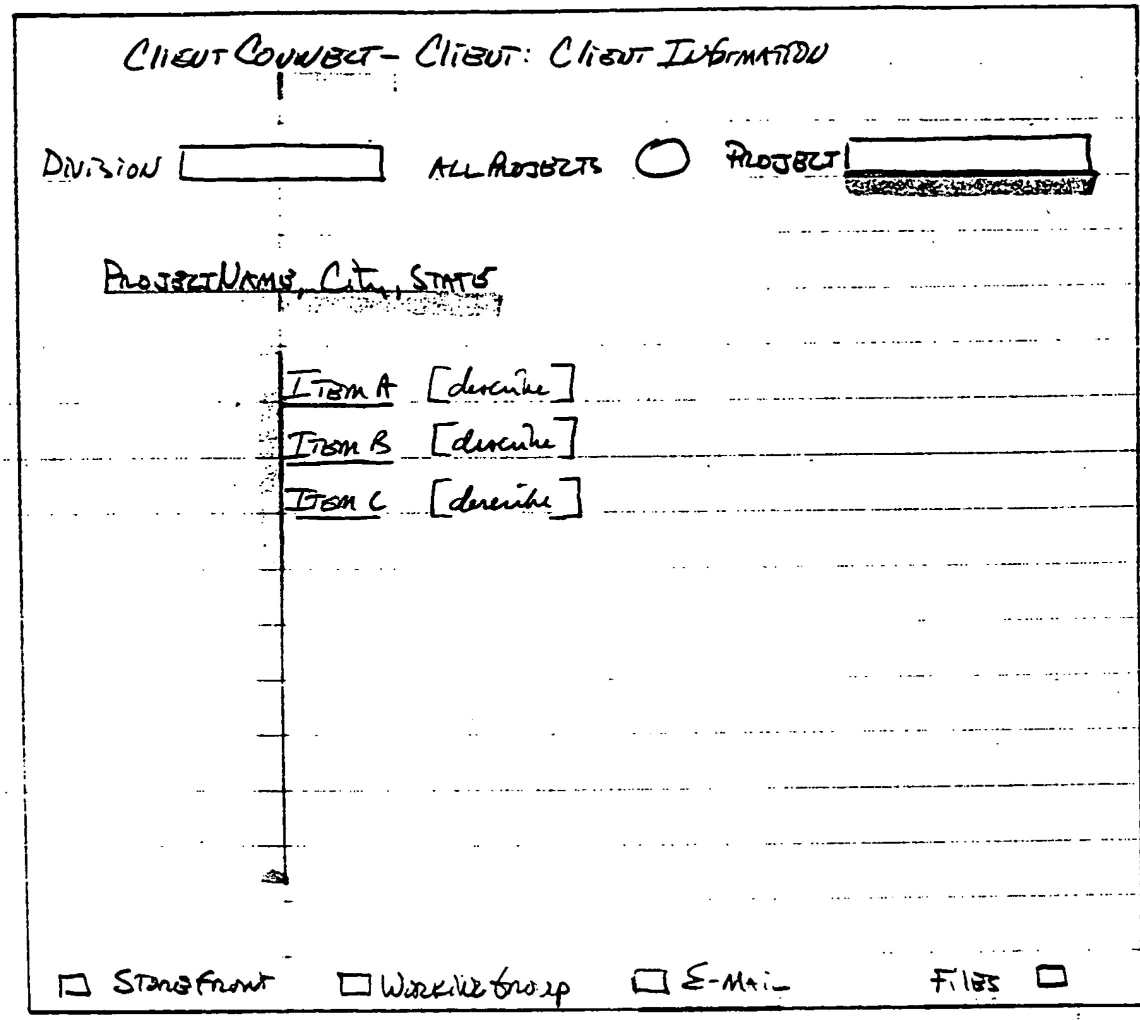
Purpose: Counsel generated info
highlight where applicable using Acrobat / Re:Mark - 2 WAY
Share among working group

Candidates:
- Drafts / Markups
- Title Commitment
- Survey
- Title Policy
- Due Diligence Info

Input: Counsel / Counsel Staff

Links: to specific Item or document

Relationship: Links only



See - Consider issues

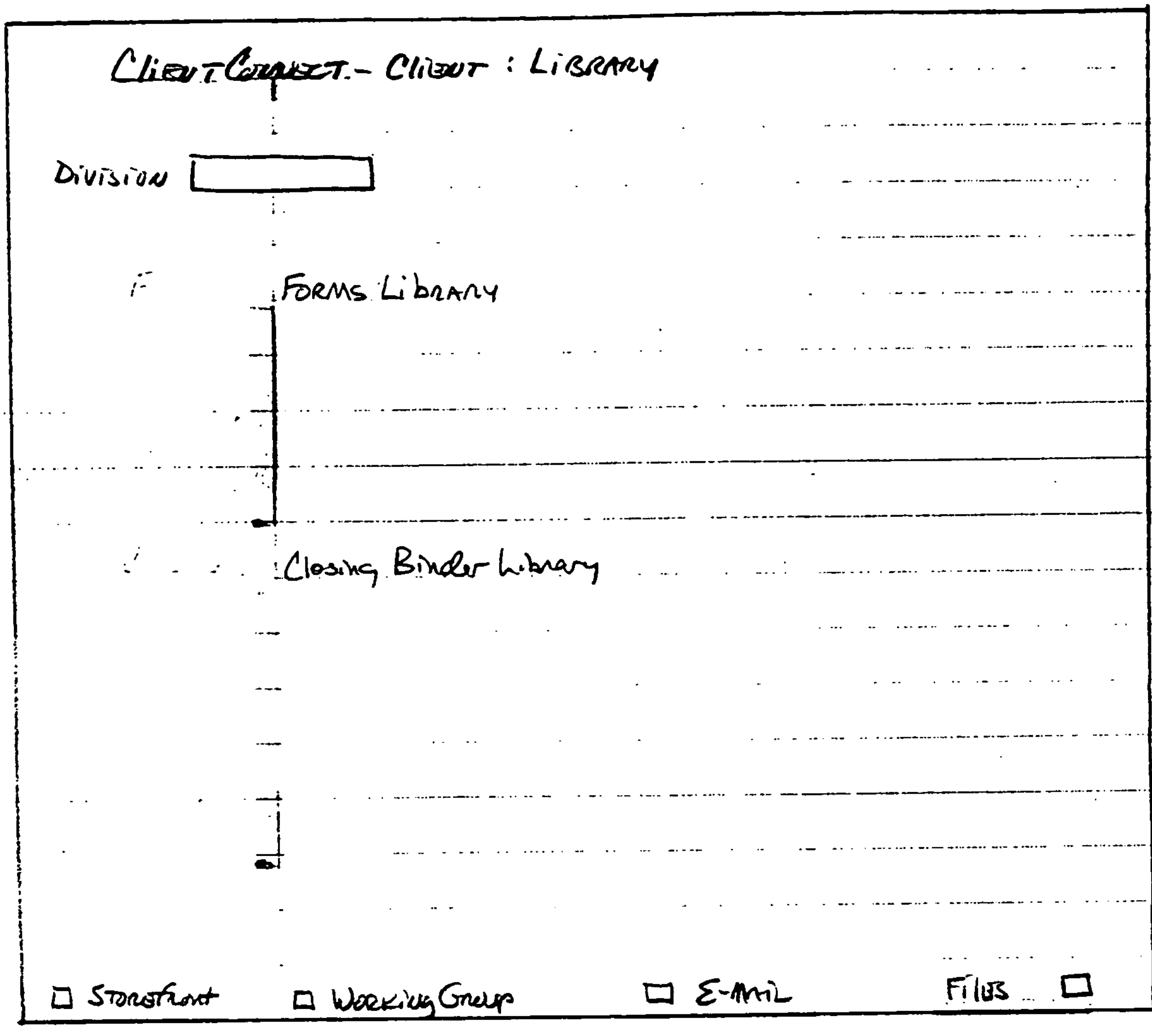
Purpose: Client Generated info
Highlight where applicable using Acrobat/RedMark - 2 WAY
Share among working group

Candidates:
- Working Groups
- Client Checklists
- Other

Input: Client / Client Staff

Links: To specific Item or Document

Relationships: Links only



Key = Links to specific form / binder

For Use When Adding New Project for an Existing Client

NEW PROJECT WIZARD

Key: Must be Able to Update During Transaction

	Field Name	**Data Input**
• Provide Name of Project	Project	Type name
• Provide Name of Project, City and State	Project Name, City, and State	Type name of project, city and state
• Add any new "Responsibility" names for Client / Counsel	Responsibility	Type new names e.g., A - new HB - new
• Add any new "Discussion" names for Client / Counsel	Discuss	Type new names e.g., A - new HB - new
• Add any new "Approved" names for Client / Counsel	Approved	Type new names e.g., A - new HB - new
• Add any new "Action Parties" for Client / Counsel	Action Parties	Type new names e.g., A - new HB - new

- Working Group Additions: Complete WG form for each new Working Group member
- E-mail

Password aspects

DATA INPUT WIZARD

RP- Can all [illegible] DATA BE INPUTED IN SPECIFIC VIEW

eg:
- STATUS
- Issues
- Critical Dates
- Checklists
- Action
- WORKING GROUPS

PASSWORD WIZARD

KEY = DEFINE PASSWORD ACCESS capabilities/limitations

NEW CLIENT WIZARD

	Field Name	Data Input
	Heading	Type name
• Does Client have different divisions that would use Client Connect? Select ○ Y ○ N		
• If Yes, then complete by listing divisions	Divisions	Type name(s) of divisions
[If No, then delete "Divisions" box]		
Will Client Connect be used for this new client for a single ~~simple~~ project or multiple projects? Select ○ S ○ M		
[If "S", then delete "All Projects" box]		
- Complete name(s) of projects	Project	Type name(s) of projects

• Select applicable components

- ○ Transaction Management
  - ○ Status
  - ○ Issues
  - ○ Critical Dates
  - ○ Checklists
  - ○ Action
  - ○ Working Group
- ○ Document Management
- ○ Counsel Information
- ○ Client Information
- ○ Library

If selected "Transaction Management" components, then select applicable Transaction Management Reports

- o Project Report
- o Status Report
- o Flag Report
- o Issues Report
- o Critical Dates Report
- o Checklist Report
- o Action Report
- o Responsibility Report
- o Discussion Report
- o Custom Reports

- Passwords -- discuss with Melson☆

- Should "Issues" be broken down into 2 or more categories?

  Select o Y o N

  - If Yes, then list categories of "Issues"

Issues Categories

Type issues categories (e.g., Input/ Initial Drafting Issues; Local Counsel Issues; Sale Agreement Issues)

- Select "Responsibility" parties can be multiple

  - o Client
  - o Counsel
  - o Local counsel
  - o Purchaser
  - o Purchaser's Counsel
  - o Seller
  - o Seller's Counsel
  - o Lessor
  - o Lessor's Counsel
  - o Lessee
  - o Lessee's Counsel
  - o Broker
  - o Title Company
  - o Escrow Agent
  - o Lender
  - o Borrower
  - o Surveyor

• For "Client" and "Counsel"	Responsibility	For Client, type first letter or two of Client's name, then hyphen, then last name for each e.g., A -- Huff A -- Barger) For Counsel, type first letter or two of Counsel's name, then hyphen, then last name for each e.g., HB - Jenkins HB - Raines
• For "Discussion", please list persons within "Client" and "Counsel" to whom "Discussion" may be assigned	Discussion	For Client, type first letter or two of Client's name, then hyphen, then last name for each e.g., A - Huff A - Barger For Counsel, type first letter or two of Counsel's name, then hyphen, then last name for each e.g., HB - Jenkins HB - Raines
• For "Approved", please list persons within "Client" and "Counsel" to whom "Approved" may be assigned	Approved	For Client, type first letter or two of Client's name, then hyphen, then last name for each e.g., A - Huff A - Barger For Counsel, type first letter or two of Counsel's name, then hyphen, then last name for each e.g., HB - Jenkins HB - Raines

ADD Lit of Dates List

Checklists

Action

Working Group

To Do's

- Templates for Project
  - Issues Categories
  - Critical Dates
  - Checklists
- Wizards -
  - New Client
  - New Project
  - Passwords
  - Data Input